



**ActivityInfo**

# **From LogFrame to Database**

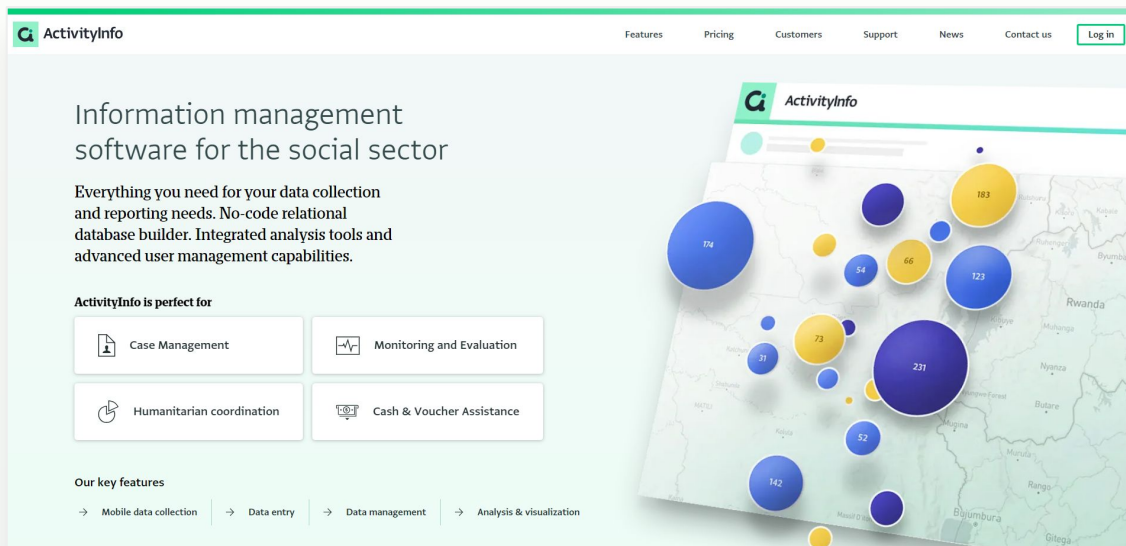
## Data and Database management

**Starting shortly, please wait!**

# Presented by the ActivityInfo Team

All in one information management software for humanitarian and development operations

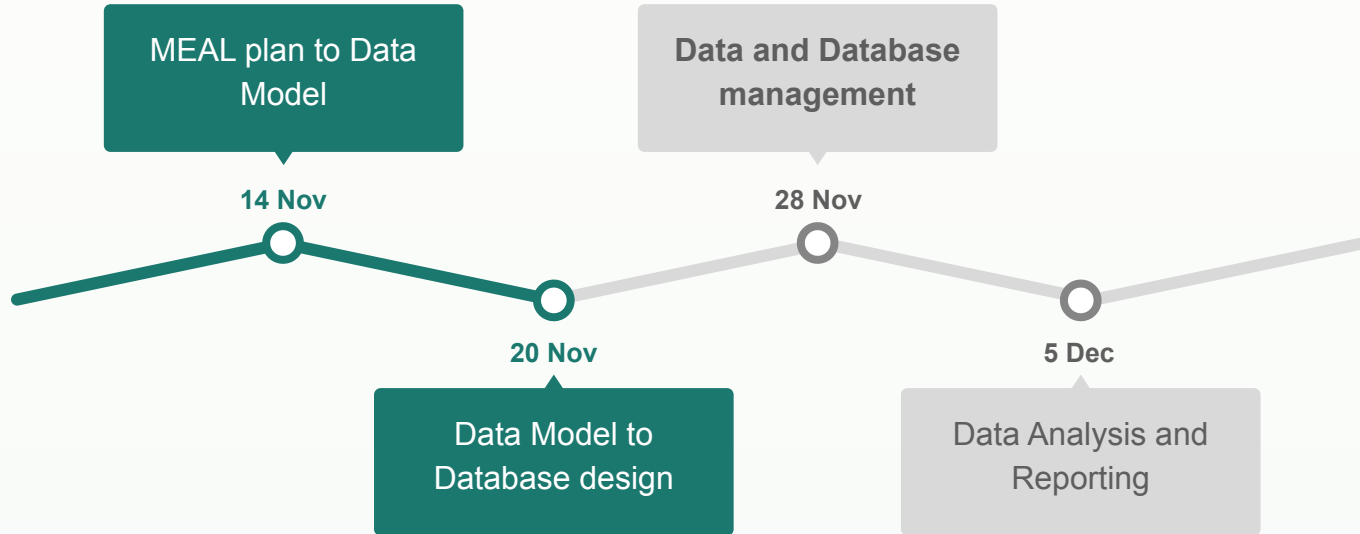
- Track activities, outcomes
- Beneficiary management
- Surveys
- Work offline/online



The screenshot shows the ActivityInfo website homepage. At the top, there is a navigation bar with links for Features, Pricing, Customers, Support, News, Contact us, and a Log in button. The main content area features the ActivityInfo logo and the text: "Information management software for the social sector. Everything you need for your data collection and reporting needs. No-code relational database builder. Integrated analysis tools and advanced user management capabilities." Below this, a section titled "ActivityInfo is perfect for" lists four categories: Case Management, Monitoring and Evaluation, Humanitarian coordination, and Cash & Voucher Assistance. Further down, "Our key features" are listed as Mobile data collection, Data entry, Data management, and Analysis & visualization. On the right side, there is a large graphic showing a map of East Africa with several blue and yellow bubbles of varying sizes, each containing a number, representing data points or activity counts in different regions.

# From Logframe to Database

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# Meet your instructors

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# Outline

## 01 How can we best manage our database?

- Secure data access
- Monitor the use
- Enable workflows
- Facilitate Data access

## 02 How can we facilitate data management?

## 03 Q&A



Setting the scene

# Theory of change

## Provide a stable source of fruits and vegetables for Mauritians

**SO1: Mauritians Increase productivity in mangoes, tomatoes, carrots, potatoes, and onions.**

**SO2: Mauritians and Partners of the Americas create a more sustainable agricultural sector in the long-term**

**IR 1.1 Mauritians access agriculture related financing**

**IR 2.2 Mauritians use of regenerative agricultural approaches**

Partners of the Americas provide targeted commodities

Partners of the Americas support the design of technologies and practices

Partners of the Americas provide targeted agricultures with related financing

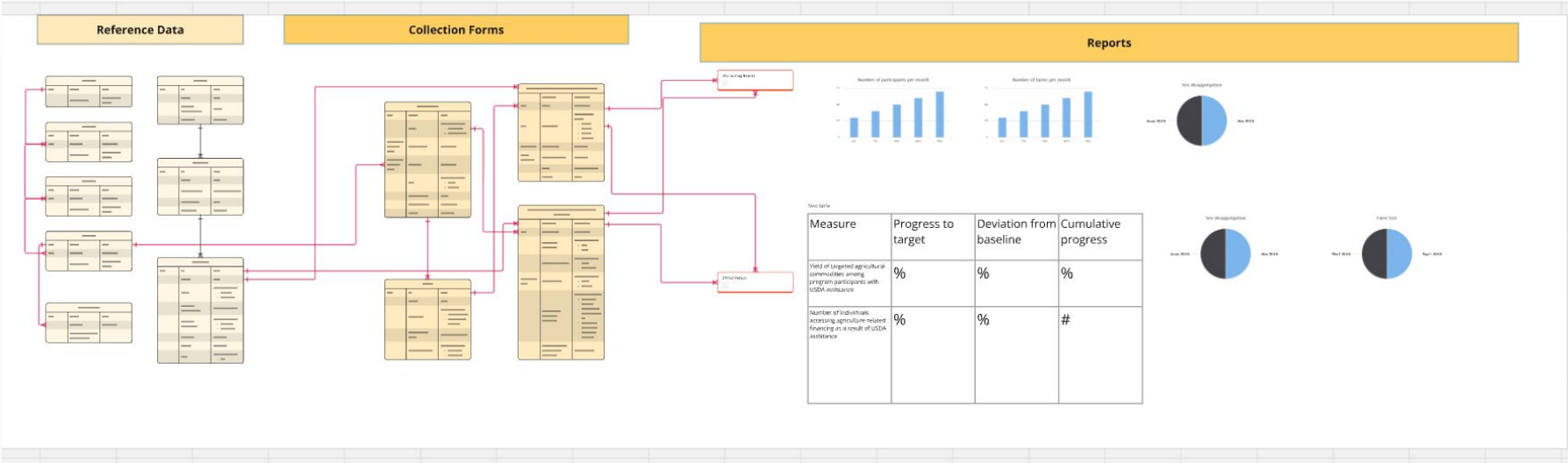
**XC IR Partners of Americas facilitate access to better support services for farmers**

# Data Model

Reference data

Collection forms

Reports





# Roles and responsibilities

## MandE Supervisors

- ✓ Overview of data collection
- ✓ Responsible for reporting and analysis
- ✓ Responsible for database design
- ✓ Access across all data collection forms

## Program Manager

- ✓ Overview of data for audit purposes
- ✓ Access to relevant reports within the system

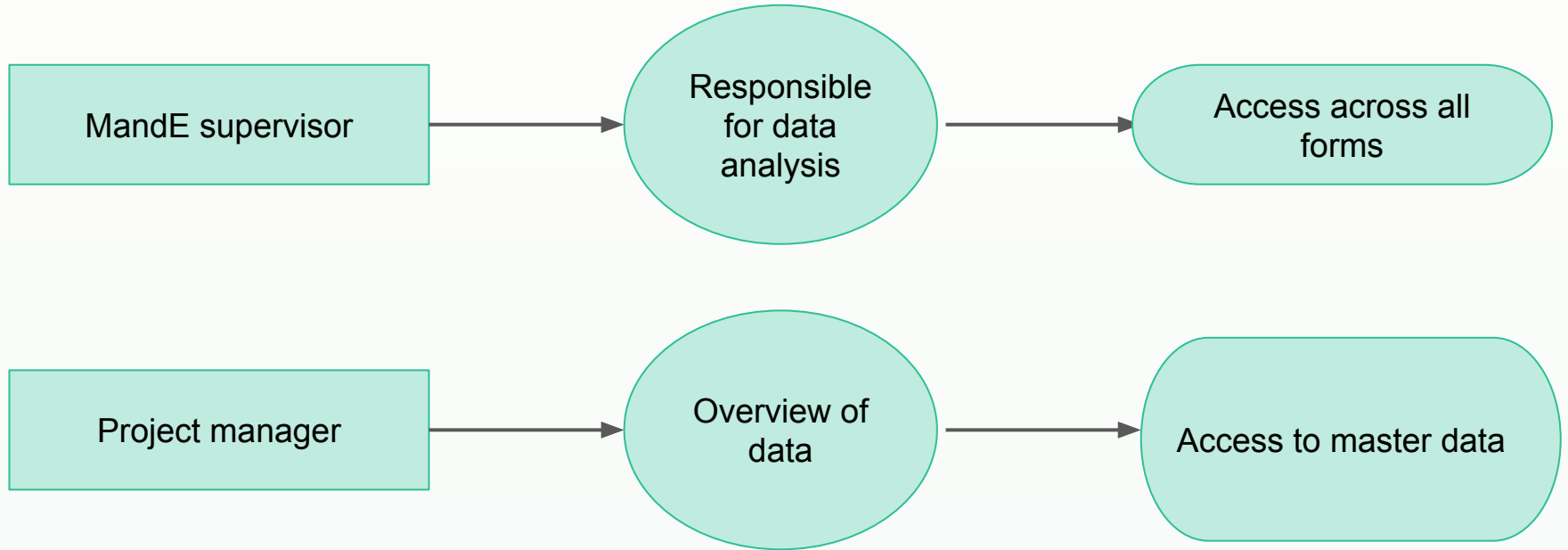
## MandE Officers

- ✓ Validate surveys
- ✓ Manage reference data
- ✓ Access across all forms

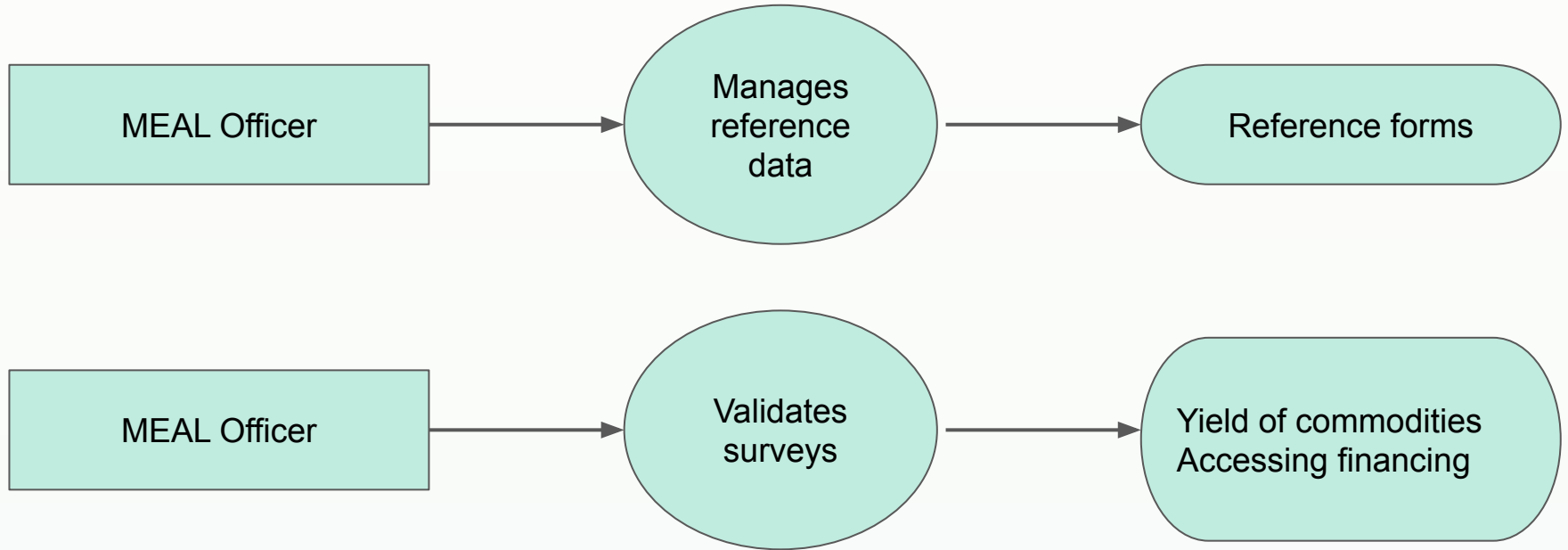
## Field Officers

- ✓ Ability to view, add and edit records across data collection forms
- ✓ Restriction [parameter] per location and field officer

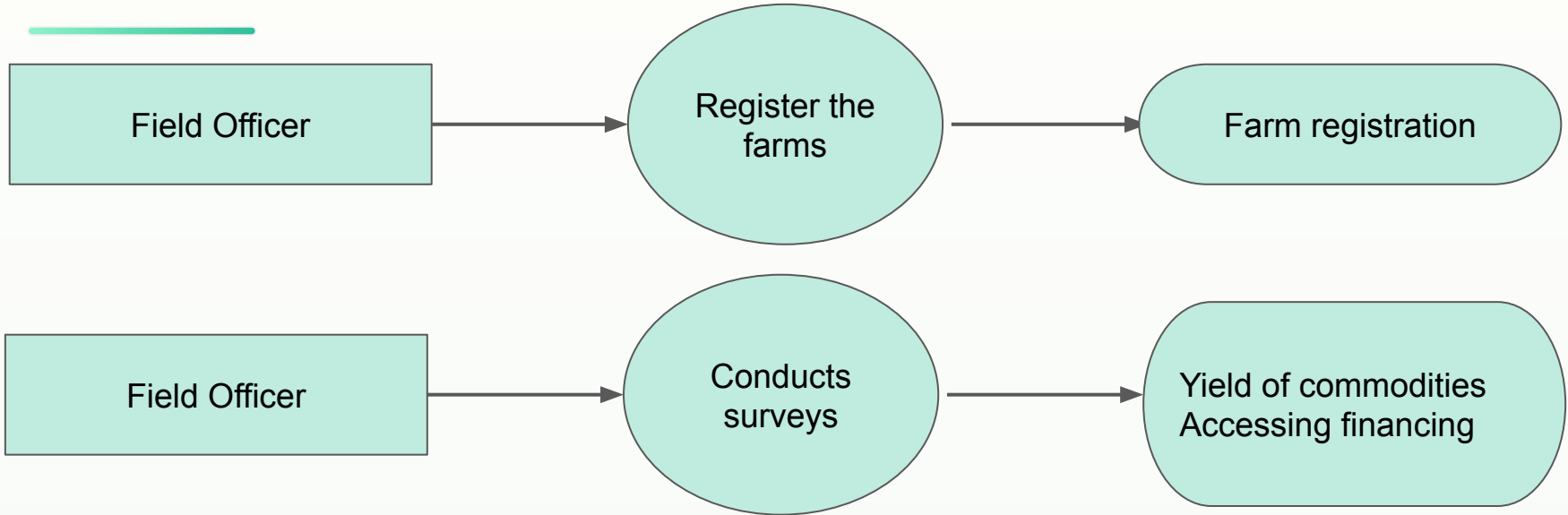
## MandE Supervisors



MandE Officers



## Field Officers



Field officers will receive an email notification at each self registration



How can we best manage our  
database?

# Efficient database management

## Secure data

- ❑ User roles and permissions
- ❑ Prevent users from adding or editing records

## Enable Workflows

- ❑ Enable automations via Power Automate

## Monitor the use

- ❑ Establish key metrics
- ❑ Perform periodic reviews

## Facilitate access

- ❑ Identify specific data views
- ❑ Translate the database as per needs



# Secure Data

# What is data security

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**Confidentiality**



Confidential data protected from exposure to unauthorized parties

**Integrity**



Prevention of unauthorized changes to your data

**Availability**



Ensuring data is available when needed to the parties who need it



# How data security principles can be implemented?

## Program Managers

- ✓ Overview of data for audit purposes
- ✓ Access to relevant reports within the system

## Field Officers

- ✓ Ability to view, add and edit records across data collection forms
- ✓ Restriction [parameter] per location and field officer

- ✓ November data collection period has finished and we review submissions

### *Specification of a role that reflects the needs the specific roles*

- Which data collections forms, folders or reports do they need access?
- Do they need access to all data under a specific form or folder?

### *Specification of a way to restricting specific permission for a specific subset of data*

- Which is the condition that defines the subset of data

# How roles are reflected in ActivityInfo?

**Roles**

+ Add role

|    |                  |
|----|------------------|
| MS | MandE Supervisor |
| PM | Project Manager  |
| MO | MandE Officers   |
| FO | Field Officers   |

FO

**Field Officers**

- Rename role
- Duplicate role
- Delete role**

Database management

- Manage automations

User management

- Manage users
- Manage roles

Resources Parameters

+ Grant resources

# How responsibilities are reflected in ActivityInfo?

## Basic

- View all records
- Display in the list of forms
- Add any record
- Edit all records
- Edit 'Reviewer only' fields
- Delete any record
- Bulk record delete
- Export records

## Design

- Add forms, folders and reports
- Edit forms, folders and reports
- Delete forms, folders and reports

## Management

- Manage translations
- Manage record locks
- Manage collection links
- Audit user actions
- Resolve duplicates

## Sharing/publishing

- Publish reports
- Share views

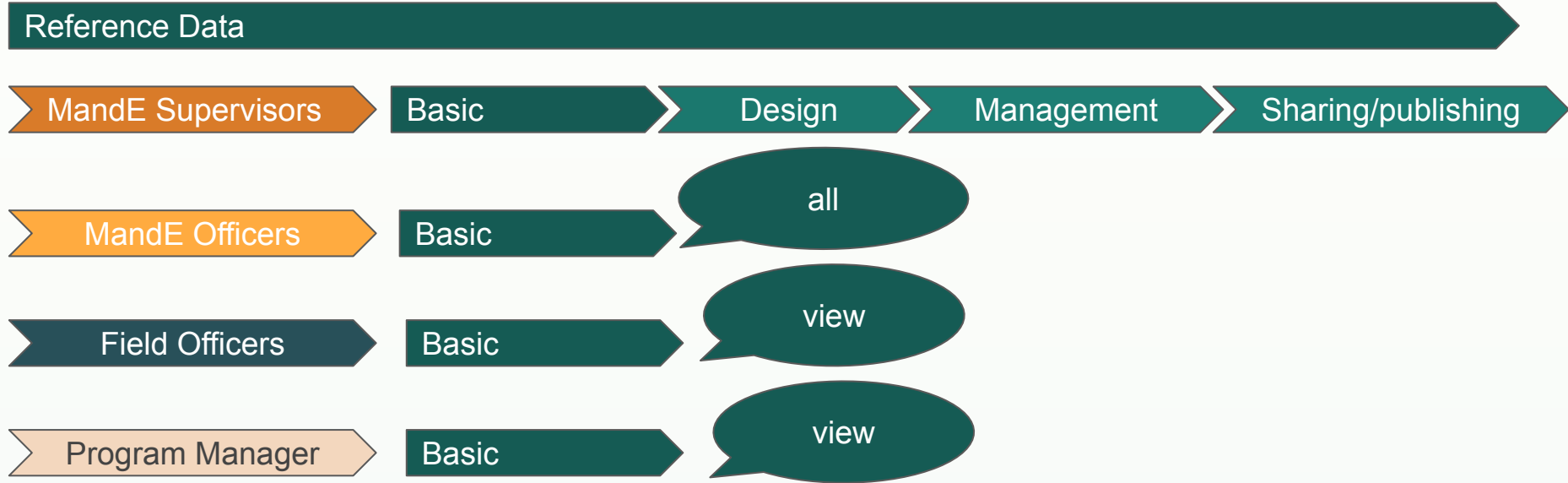
**Manage automations/User and roles**

# Key Concepts

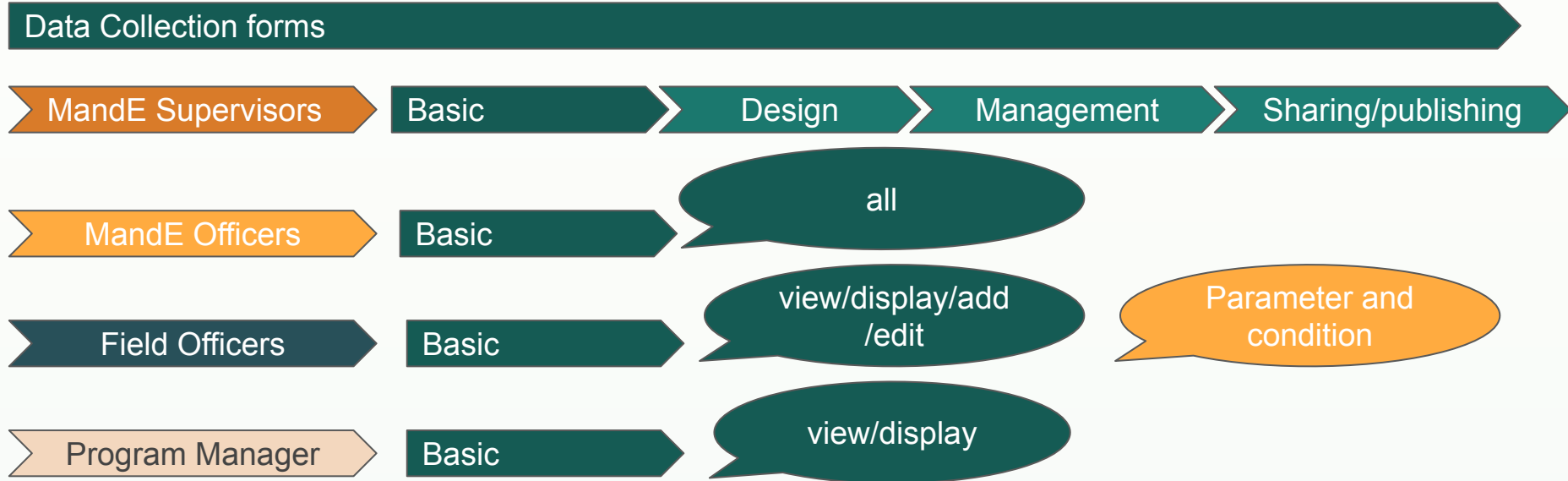
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- **Roles:** Combinations of Grant Resources and Parameters.
- **Resources:** Forms, Folders, Reports, and Databases.
- **Parameters:** Assign attributes to users for conditions.
- **Conditions:** Define rules for user operations.

# Work flows



# Work flows



# Locks

The image shows two parts of a software interface. On the left, a database overview page titled "This database" lists several resources. The resource "Individuals accessing agriculture-related financing" is highlighted with a green border and has a "Move" button next to it. On the right, a form titled "Individuals accessing agricult..." is shown. The form has a header "FORM" and a main title "Individuals accessing agricult...". Below the title, there is a green bar with a plus icon and the text "Add date range lock". The form is titled "Edit date range lock" and contains the following fields: "Name" with the value "End of survey period 1", "from" with a calendar icon and the date "2024-11-01", and "to" with a calendar icon and the date "2024-11-30". There is a checked checkbox labeled "Active". At the bottom of the form, there are three buttons: "Delete" (red), "Cancel" (grey), and "Save" (green).

***Prevent users from adding or editing records in a specific resource. Locks provide an additional layer of security and control to support effective and reliable data management.***

# Let's see in detail the examples....

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Field officer view

Program Manager view

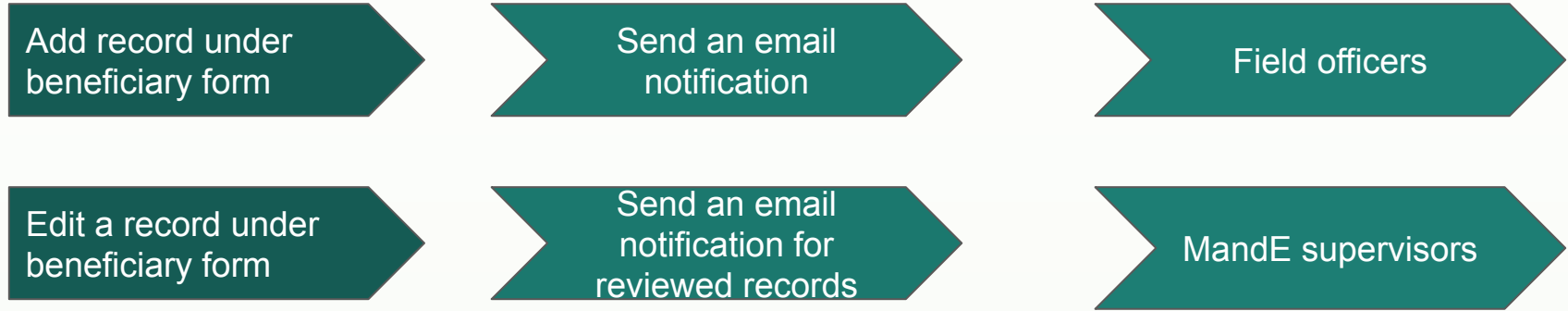
November locked records



# Enable workflows

# Enable workflows

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Help you optimize your workflows by reducing the tasks done manually

- Are triggered by adding, editing, deleting a record
- Can be specified when specific conditions are met

***Third party integration***



# Monitor the use

# Why we should monitor the database?

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**Optimize performance  
And strengthen  
accountability**

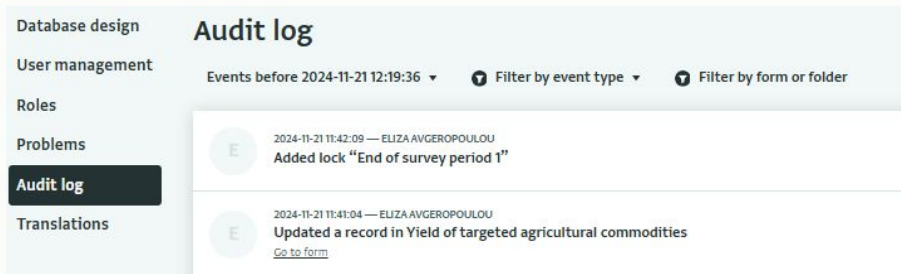
- ❑ Identify training needs
- ❑ Identify usage per data collection form
- ❑ Reverting form configuration mistakes

**Security**

- ❑ Identify unauthorized actions
- ❑ Identify any omission in the roles creation

# How can we monitor in practice?

MandE Supervisor needs to identify changes in the beneficiary data collection form in order to correct a mistake



The screenshot shows the 'Audit log' section of the MandE Supervisor interface. On the left is a navigation menu with items: Database design, User management, Roles, Problems, **Audit log** (highlighted), and Translations. The main content area is titled 'Audit log' and includes a filter for 'Events before 2024-11-21 12:19:36' and two other filter options: 'Filter by event type' and 'Filter by form or folder'. The log contains two entries:

- 2024-11-21 11:42:09 — ELIZA AVGEROPOULOU  
Added lock "End of survey period 1"
- 2024-11-21 11:41:04 — ELIZA AVGEROPOULOU  
Updated a record in Yield of targeted agricultural commodities  
[Go to form](#)

***Ability to query audit log via the API and R***



# Facilitate Data access

# Facilitate data collection and access to data

The ManE officer needs to:

- Navigate easily across forms and records
- Print record for audit purposes
- Confirm record history

Different users - different views

- Beneficiary view:** for review purposes
- General view:** for a quick beneficiary screening
- Personal View**

Need to translated in **French** as per local needs

## Manage the table

- ✓ Filter and Sort
- ✓ Print records
- ✓ See record history
- ✓ See associated forms-reverse reference

## Customize views

- ✓ Customize views
- ✓ Change display reader

## Translate

- ✓ Translation from System defined language to multiple languages
- ✓ Automatic translation and ability to edit the automatic translation

# Let's see in detail the examples....

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MandE officer's needs

Different users - different needs

Localize and translate





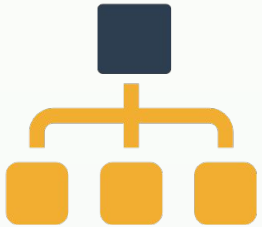
Facilitate data management

# Do we have data outside of the database?

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- What data you have?
- What format?
- Where those are stored?



Organize data per data collection form

- Deduplication
- Consistency
- Data format match field type
- Organize columns

**Import into ActivityInfo**

# Migration

Data on Beneficiary and farms

An excel on beneficiary

Import in the respective form

An excel on farms

Import in the respective form  
[ maintain parent ID]

| Field Officer Name | Type        | Name           | Admin 1 Nam | Admin 2 Nam | Admin 3 Nam | Admin 4 Nam     | Sex | Date of Birth | Age | Age Group | Reviewed | Farms |
|--------------------|-------------|----------------|-------------|-------------|-------------|-----------------|-----|---------------|-----|-----------|----------|-------|
| Field Officer 4    | Cooperative | Beneficiary 1  | Trarza      | Tékane      | Tékane      | Gani            | Fer | 2004-10-08    | 20  | 18-29     | Yes      | 1     |
| Field Officer 1    | Individual  | Beneficiaire 3 | Brakna      | Bababé      | Bababé      | Abari           | Ma  | 2001-10-22    | 23  | 18-29     | Yes      | 0     |
| Field Officer 1    | Individual  | Beneficiary 2  | Brakna      | Bababé      | Bababé      | Abari           | Ma  | 2001-10-22    | 23  | 18-29     | Yes      | 1     |
| Field Officer 3    | Cooperative | Beneficiary 3  | Brakna      | Boghé       | Boghé       | Béli Ourdí Diol | Ma  | 2000-08-23    | 24  | 18-29     | Yes      | 0     |
| Field Officer 6    | Cooperative | Beneficiary 4  | Trarza      | Tékane      | Lexeiba 2   | Elmebrouk       | Ma  | 1999-10-22    | 25  | 18-29     | Yes      | 0     |
| Field Officer 14   | Cooperative | Beneficiaire 6 | Trarza      | Tékane      | Lexeiba 2   | Elmebrouk       | Fer | 1999-10-22    | 25  | 18-29     | Yes      | 0     |
| Field Officer 3    | Cooperative | Beneficiary 5  | Trarza      | Tékane      | Tékane      | Gani            | Fer | 1996-10-01    | 28  | 18-29     | Yes      | 0     |
| Field Officer 13   | Cooperative | Beneficiaire 1 | Brakna      | MBagne      | Niabina     | Ali baidi       | Fer | 1994-10-08    | 30  | 30+       | Yes      | 0     |
| Field Officer 6    | Individual  | Beneficiary 8  | Gorgol      | Kaedi       | Lexeibe     | Agjoula         | Ma  | 1991-06-10    | 33  | 30+       | Yes      | 0     |
| Field Officer 2    | Individual  | Beneficiaire 5 | Gorgol      | Kaedi       | Lexeibe     | Agjoula         | Ma  | 1991-06-10    | 33  | 30+       | Yes      | 1     |
| Field Officer 5    | Individual  | Beneficiary 16 | Gorgol      | Kaedi       | Lexeibe     | Bokol Thilé El  | Fer | 1989-10-09    | 35  | 30+       | No       | 0     |
| Field Officer 5    | Cooperative | Beneficiary 9  | Brakna      | Bababé      | Aéré M'Bar  | Aéré Mbar       | Fer | 1988-10-16    | 36  | 30+       | No       | 0     |
| Field Officer 10   | Cooperative | Beneficiary 15 | Brakna      | Bababé      | Aéré M'Bar  | Beilami         | Ma  | 1988-10-16    | 36  | 30+       | Yes      | 1     |

# How to manage data within ActivityInfo

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- Edit data to keep the most recent change
- Use the importer to bulk update data



## Duplicate scanner

- Detect duplicates according to determined fields
- Determine level of matching
- Resolve duplicates

# Manage duplicates

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Beneficiary form

Beneficiaries  
duplicates across  
admin areas

Duplicate check  
according to  
Name, Sex,  
DoB

Maintain the  
correct record

# Let's see in detail the examples....

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**Migration**

**Manage duplicates**

# Key Messages

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- Consider how users need to access their data according to the needs of each roles
  - Roles and responsibilities is the heart of data security
- Perform periodic reviews in the system in order to:
  - ensure that it is being efficiently used
  - identify any next actions
- Consider the data management process
  - it is important to have the data stored within a common system - migration
  - It is important to establish period reviews for duplicate records within the system

# Questions?

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LinkedIn page: <https://www.linkedin.com/showcase/activityinfo/>

LinkedIn group: <https://www.linkedin.com/groups/5098257/>

Twitter: <https://twitter.com/activityinfo>



# Resources

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- [Food for Progress Project](#)